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America's Watching

*Public
Attitudes
Toward
Television*

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THE NETWORK TELEVISION ASSOCIATION was founded in April 1990 by ABC, CBS, and NBC with the mission of contributing to the ongoing dialogue with the marketing and advertising communities. The NTVA is an industry source for primary research and in-depth custom analyses which shed light on television viewership behavior. Through advertising campaigns, industry forums, and marketing presentations, the NTA is helping to build greater awareness of network television's unique attributes as an advertising medium.

THE NETWORK TELEVISION ASSOCIATION
825 Seventh Avenue
New York, New York 10019

THE NATIONAL ASSOCIATION OF BROADCASTERS is the major trade association representing the broadcasting industry. NAB offers a wide variety of member services in addition to providing legislative, legal, and regulatory representation. Members include radio and television stations, as well as all of the major radio and television networks.

THE NATIONAL ASSOCIATION OF BROADCASTERS
1771 N Street N.W.
Washington, D.C. 20036

Introduction

Since 1959, Roper Starch Worldwide has tracked the evolving and expanding role of television in the lives of Americans. Over that time, the range of home entertainment choices has grown exponentially, with recent years witnessing the rise of the home computer, multimedia, and assorted on-line services.

With the country now firmly entrenched in what has frequently been termed the Information Age, **fresh questions have arisen concerning whether television will continue playing the dominant role it has over the years. As this study demonstrates, television is as central to Americans' lives as it has ever been, and appears poised to stay that way into the foreseeable future.** Among the key findings:

- **Nearly all Americans watch TV in a typical week — particularly on a major broadcast network or affiliated local station — far more than use computers, on-line services, or similar home entertainment options.**
- Most viewers make a special effort to watch particular programs, again primarily on the networks or their affiliates.
- Americans are ambivalent about the prospect of having 500 channels to choose from, and relatively few seem willing to pay the price, financial or otherwise, for such a system.
- The much-hyped “information superhighway” has yet to capture most of the public’s imagination, and even among those most interested, there is no indication that they are deserting the television set.

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television continues to be far and away Americans' primary and most credible source for news and information

Thus, far from seeing its status recede in this time of increased options, television is thriving as never before.

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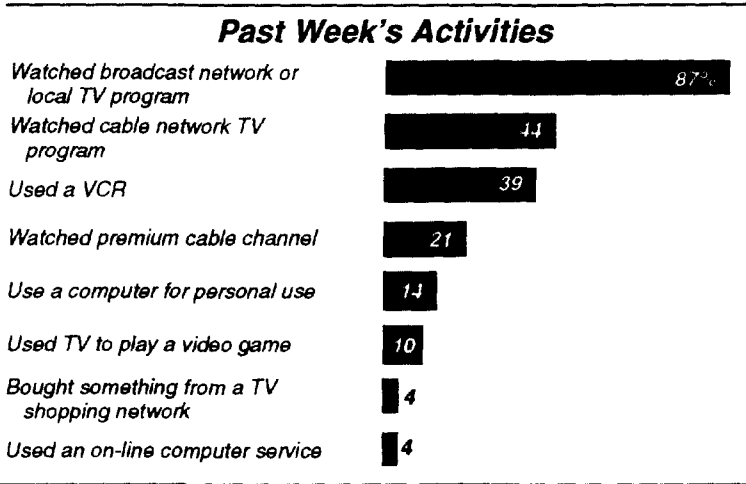
Part I: Americans and their Relationship to Television in the Information Age

Television: A Constant Presence

Television continues to be a significant presence in virtually everybody's life. Even with the growth of computers and other new choices for home entertainment, ~~an overwhelming majority of Americans watch television on a regular basis.~~

When asked which of a list of television and home technology activities they personally have done at home in the previous week, ~~more than 9 in 10 Americans (93%) respond that they watched a television program on either broadcast or cable television.~~ This includes 87% who watched a TV program on a major broadcast network or affiliated local station—by far the most common answer given—as well as those who watched a program on a cable network or who tuned into a premium cable channel.

Among other activities, the most popular is using a VCR to watch or record a program or movie. ~~Personal use of home computers (14%) lags far behind TV-related activities, and only 4% of the public used an on-line computer service.~~

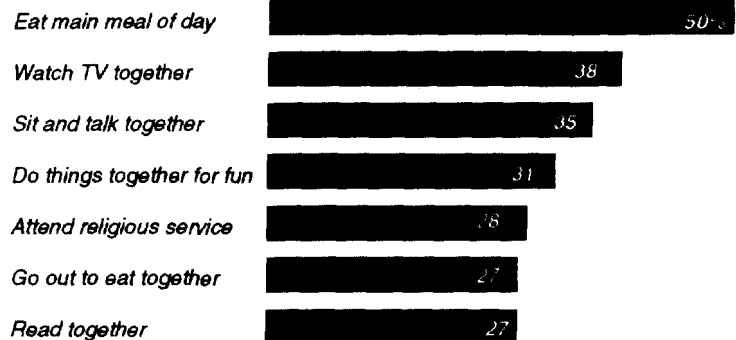


Television Brings Families Together

As a form of entertainment with appeal to all age groups, television often is a central part of family activities. **Four in 10 parents of children under 18 state that their family "frequently" watches television as a family unit (including parents and at least some of the kids), ranking below only "having the main meal together" as a commonplace family activity.** By way of comparison, watching television is about as frequent a family activity as "sitting and talking," and a more frequent activity than: doing things for fun and recreation, attending religious services, going out to eat, and reading together.

As one might expect, the percentage of families watching television together is slightly higher among parents of children under age 8 (44%). And even in families where both parents work, a third (34%) of parents still have the time to "frequently" watch television with their children.

Things Done "Frequently" as a Family

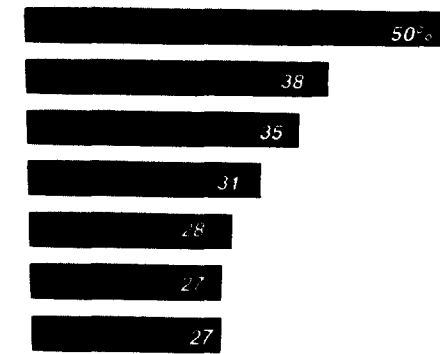


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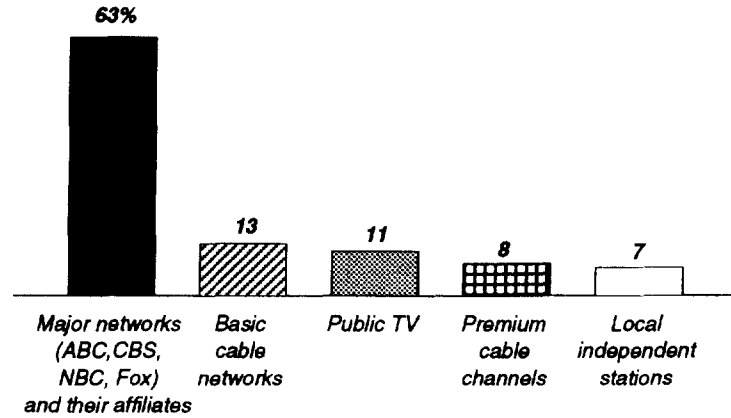
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"Frequently" as a Family



With regard to what type of television families watch, network television is clearly the medium of choice. When asked which kind of television they last watched as a family, 63% of parents mention network television. Well behind in popularity are the basic cable networks (USA, ESPN, Lifetime, etc.), public television, premium cable channels, and local independent stations.

What Families Are Watching Together

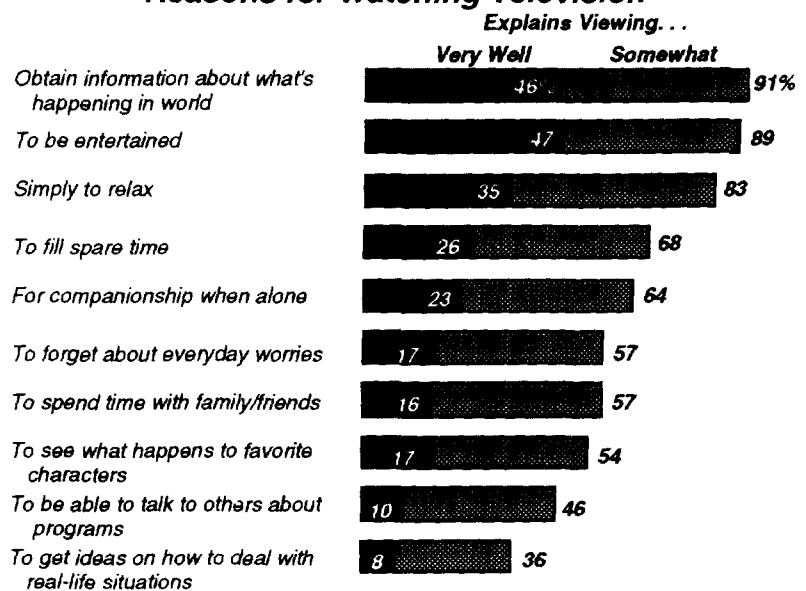


Television Satisfies Many Needs

Why do people watch television? Not for any one reason. Moreover, the varied responses to this question highlight the diversity of television's appeal. Among a list of ten possible reasons why people watch television, eight are cited by majorities of Americans as explaining their viewership "somewhat" or "very well."

The top three responses to this question are indicative of this diverse appeal. "Obtaining information about what is happening in the world" is the top reason for watching, with just over nine in ten Americans saying this explains their use of television "somewhat" or "very well." However, virtually the same number agree that "to be entertained" is an important component of their reasons for watching. And finishing just behind these two as an explanation for why people watch is "simply to relax."

Reasons for Watching Television



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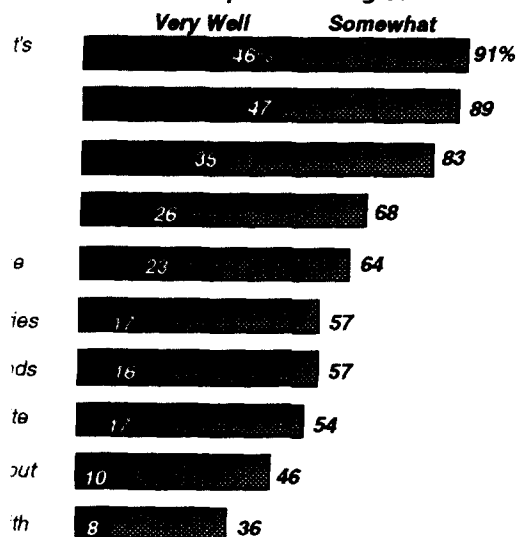
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Other reasons for television viewership which are given by a majority of the public are: to fill spare time, for companionship when alone, to forget about worries of everyday life, to spend time with family and/or friends, and to see what happens to favorite television characters.

Clearly, large numbers of Americans are benefiting in multiple ways from their television viewing.

for Watching Television

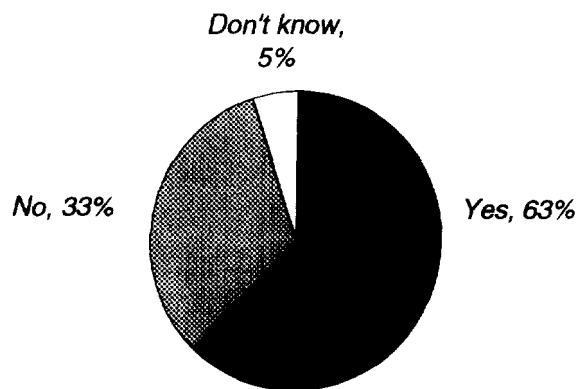
Explains Viewing...



Viewers Make Appointments With Network Television

Most viewers make appointments to view their favorite television programs. They demonstrate their commitment by seeking out programming they know is scheduled to run at a particular day and time. **In fact, 63% of the public make a "special effort" to view television programming of one kind or another.**

Are There TV Programs You Make a "Special Effort" to Watch?



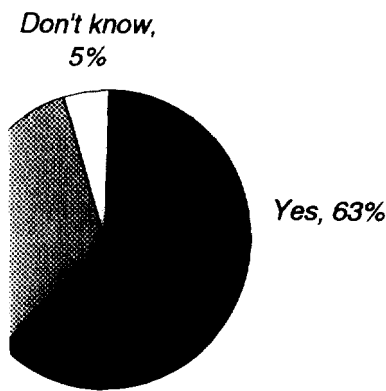
**Appointments With
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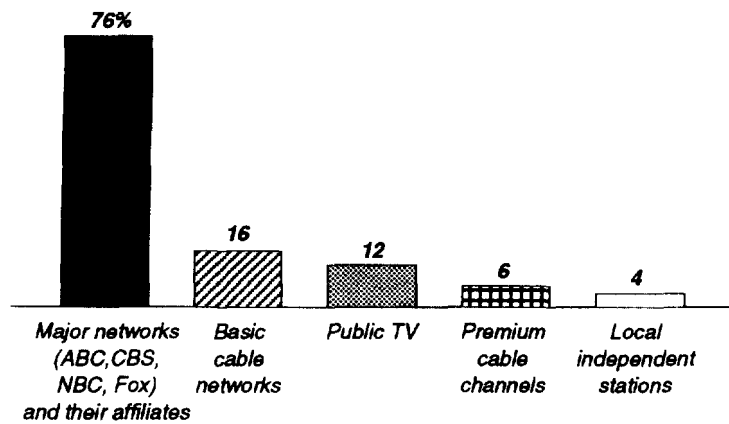
Among these “appointment viewers,” fully three quarters
mention network television when asked which kind of
television has the most programs they make a special effort
to watch. The basic cable networks are far behind at 16%.
Rounding out the list are public television, local independent
stations, and premium cable channels.

Network television's dominance in this area holds true even
in cable TV households, where 74% do most of their
appointment viewing on network television, virtually identical
to non-cable households.

**TV Programs You Make a
ial Effort” to Watch?**



**Where “Appointment Viewing”
Most Often Occurs**



Part II: Television and the Media Landscape of Tomorrow

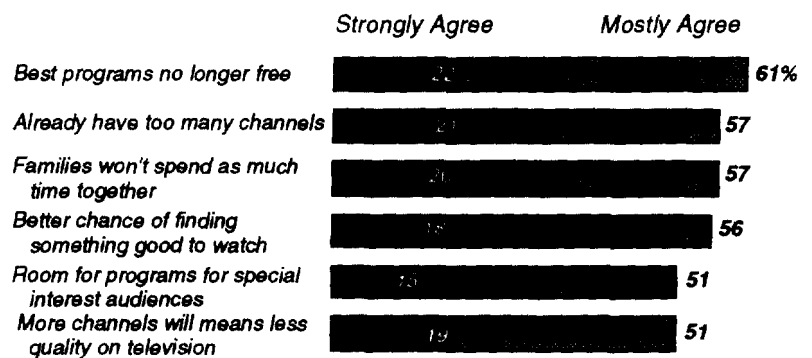
500 Channels: Too Much Of A Good Thing?

There has been a lot of talk about the possibility that Americans will soon be able to choose from as many as ~~500 different~~ channels. Current indications, however, are that the public is at best ambivalent about this prospect, and may in fact be unwilling to pay the price, financial and otherwise, for such an array of channels.

On the positive side, a majority of the public believes that more channels will improve the chance that they will find something good to watch. And about half the public likes the idea that added channels will provide room for more specialized programming.

On the negative side, however, 57% agree there are already too many television channels, saying "I don't even use all that I have." Even more ominous, majorities of the public fear

Attitudes Towards 500 Channels



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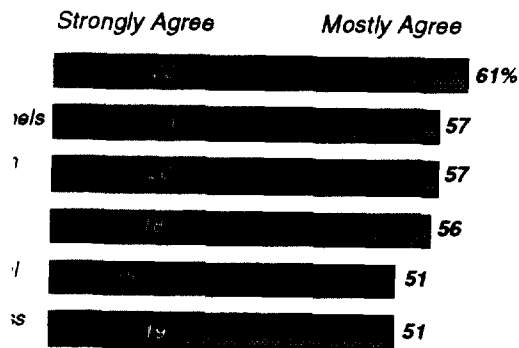
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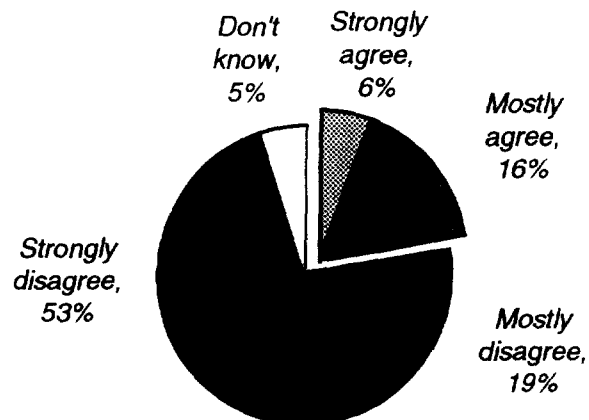
Towards 500 Channels



certain negative consequences, intended or otherwise, of such a system. For example, 6 in 10 Americans expect that in a 500 channel system, the best programs will no longer be free, but rather require additional fees. Nearly as many see a threat to the time spent by families viewing together, as more choices cause family members to watch different programs on their own television sets. And just about half believe that more channels will probably mean less, rather than more, quality programming.

Finally, nearly three-quarters of the public would be unwilling to pay \$50 a month for 500 channels — even assuming they liked what was available. This includes a majority of the public that is "strongly" opposed to paying such a monthly fee. Thus, even to many for whom the idea of 500 channels sounds good in theory, the prospect becomes far less alluring once a price tag is attached.

I Would Be Willing To Pay \$50 Per Month For 500 Channels

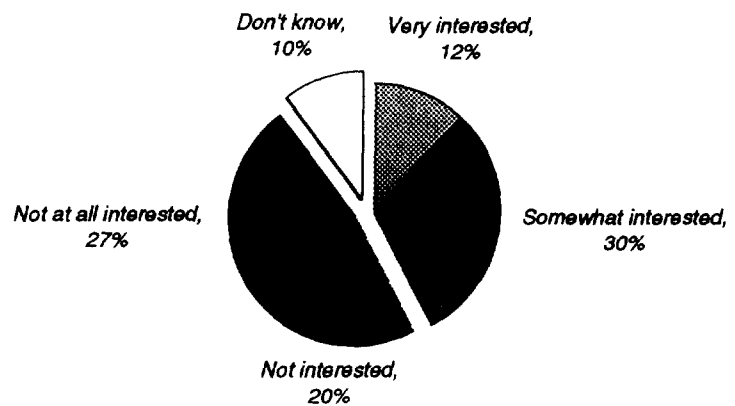


The "Information Superhighway:" No Replacement For TV

Despite no shortage of media attention, it appears that most people are not yet clamoring to get on the so-called "information superhighway." Only 12% of the public is "very interested" in the types of electronic products and services for the home that the superhighway promises to deliver, with another 30% being "somewhat interested." Meanwhile, nearly half of the public profess to various degrees of disinterest, with 20% being "not too" and another 27% "not at all" interested.

Still, regardless of the level of public interest that may or may not exist today, there appears to be little doubt that the information superhighway and associated technologies will increasingly become a fact of life in our society. **The question then arises as to what if any impact these competitors for the public's time will have on television viewing habits.**

Interest in "Information Superhighway"

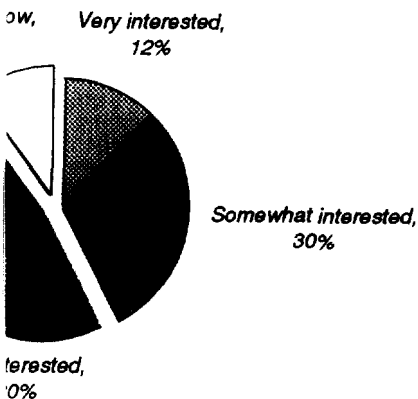


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One way of gauging this question is to examine more closely that segment of the population which is ahead of the curve with respect to these new technologies — i.e., the 12% of the population who claim to be "very interested" in the information superhighway, and whom we have coined the "likely early adopters."

As one would expect, these likely early adopters are more apt than the total population to use a computer for personal use (40% in a typical week, vs. 14%), play a video game on a television set (18% vs. 10%), or use an on-line computer service (14% vs. 4%).

Nonetheless, these additional activities are not replacing television, which this segment of the population continues to view in overwhelming numbers. Ninety five percent of likely early adopters watch television in a typical week, including 86% who watch a major broadcast network or local station — virtually identical to the 93% and 87%, respectively, among the general public. And with regard to *how* they watch, early adopters are significantly *more* likely than the general public, by a margin of 74% to 63%, to make a special effort to watch certain programming.

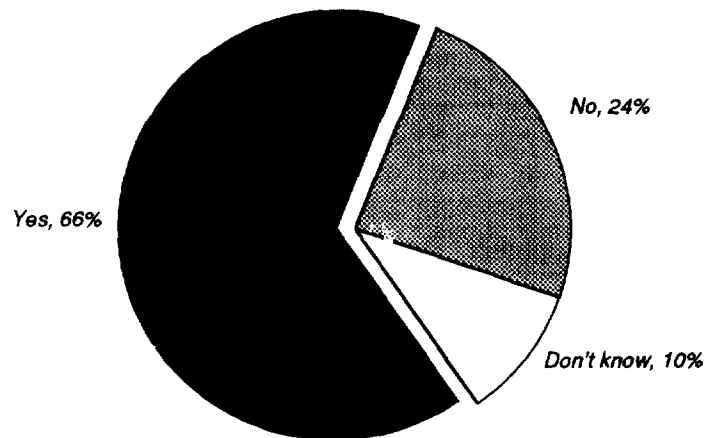
Part III: Television and Programming Content

Support for Commercial Television: A Fair Price To Pay

Television commercials have always been an easy target for critics. Nonetheless, over the years, this study has consistently documented that a sizable majority of the public supports commercially-sponsored television.

Currently, two-thirds of the public agree that, all things considered, having commercials on television is a fair price for being able to watch it. In contrast, only 24% disagree with this proposition, with 10% saying they don't know. Clearly, free television is something the public still values, even at the price of occasional interruptions to their viewing.

Are Commercials a Fair Price to Pay For Television?



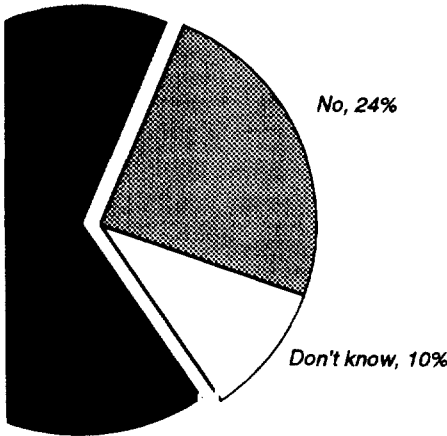
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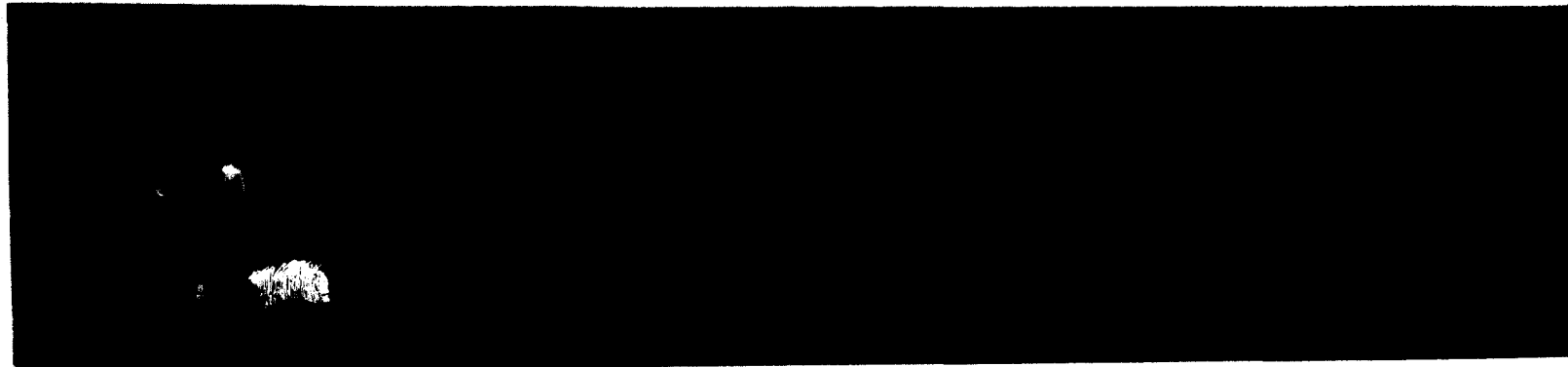
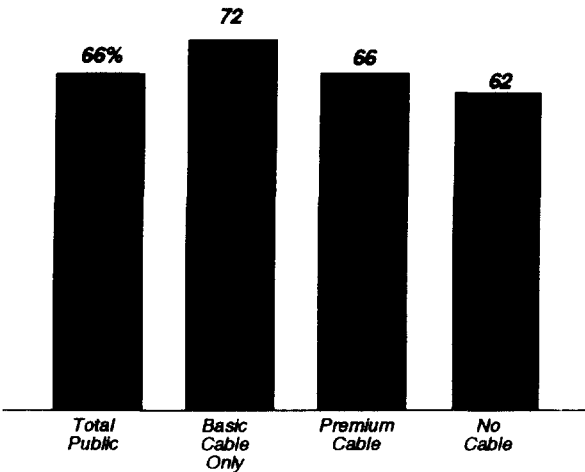
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Interestingly, this finding holds true regardless of cable
subscribership, with results falling in the same general range
for basic cable, pay cable, and non-cable households. Thus,
it does not appear that many households are signing up for
cable to avoid commercials on broadcast TV.

Believe Commercials Are a Fair Price to Pay

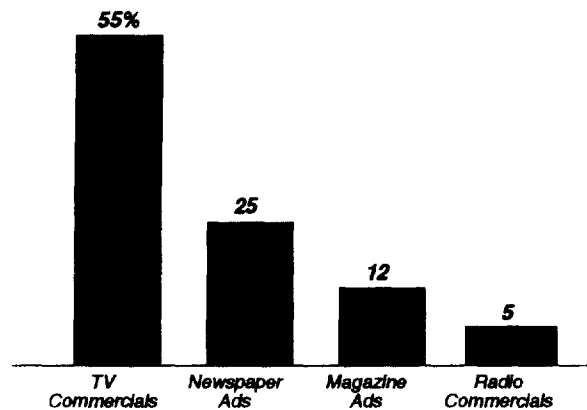


Television Commercials Provide Useful Information

Actually, television commercials are more than just a "fair price" for otherwise free programming — most viewers find them quite useful in their own right.

When asked about advertising sources from which they are most likely to learn about products or brands of products they might like to try, over half the public cite television commercials. This represents a better than 2 to 1 advantage over newspaper ads, with magazine ads and radio commercials garnering considerably fewer mentions.

Where Most Likely to Learn About Products

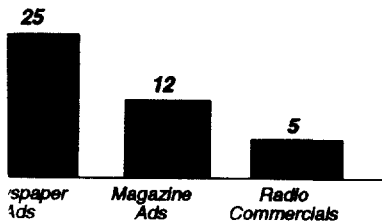


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Ability to Learn About Products

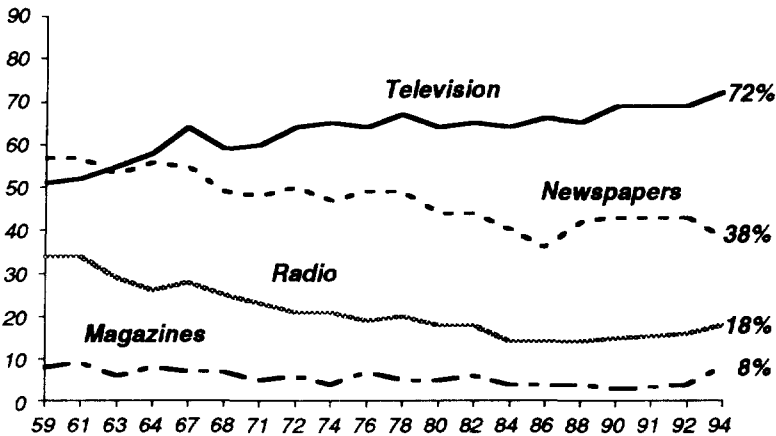


TV News: Dominant and Credible

Among the main reasons people turn to the media is to stay
informed about the world around them. And within the
barrage of news sources available to the public today,
television once again stands out as the most utilized, as well
as the most credible.

More Americans today rely on television as their primary
news source than at any time since this poll began in 1959
(with the exception of a special reading taken during the
Persian Gulf War in 1991), far outpacing its closest
competitors, newspapers and radio. The 34-point gap
between television and newspapers is up 8 points since
1992, when the respective mentions were 69% for television,
43% for newspapers.

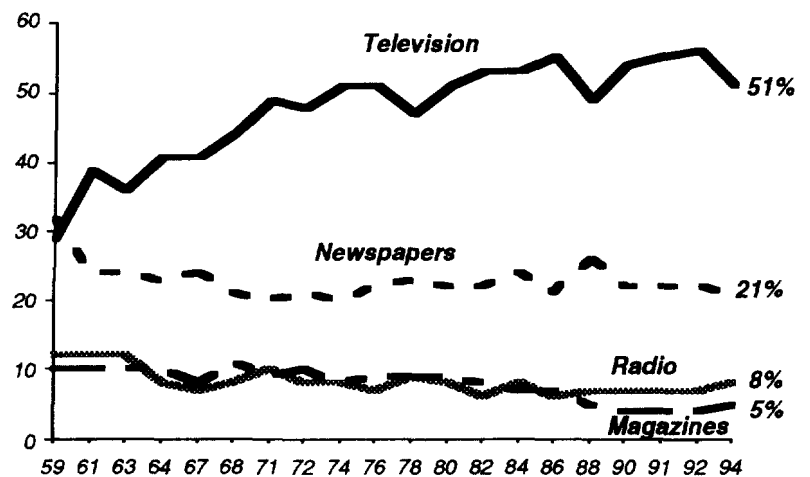
Americans' Primary Media Sources of News
(Multiples responses permitted)



Note: A special February 1991 Persian Gulf war reading is not shown,
although results are available on page 34.

And not only is television our nation's most dominant news source, it also is regarded as the most credible. When asked which media they would be most inclined to believe when receiving conflicting information, television is cited over newspapers by more than 2 to 1, with radio and magazines trailing the pack.

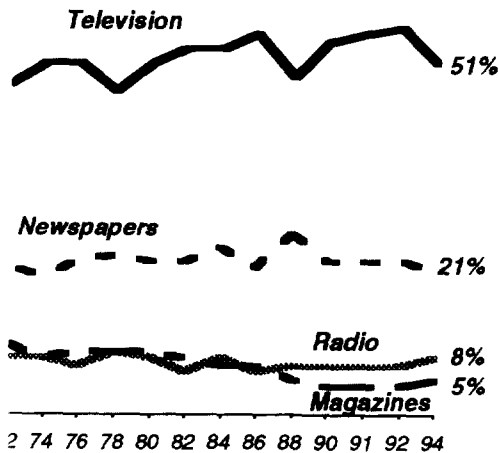
Which Media Report is Most Credible?



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Report is Most Credible?

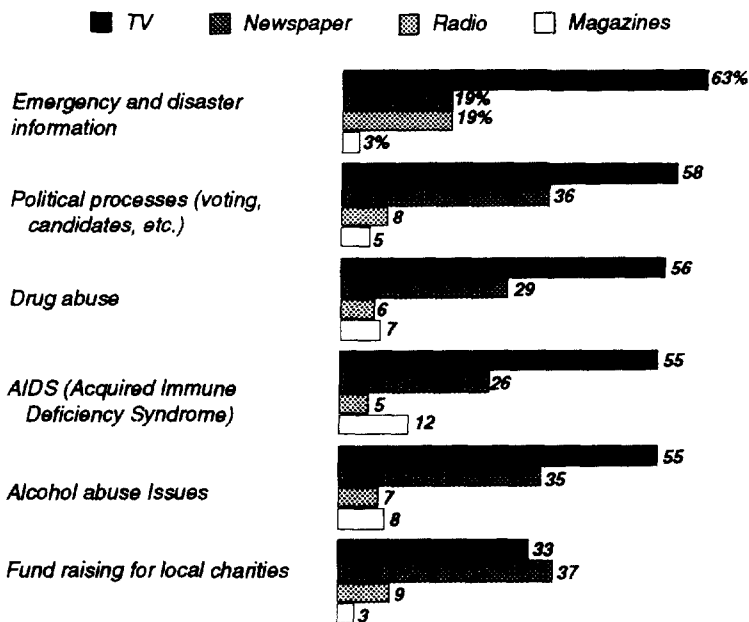


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Television: A Primary Source of Public Service Information

Americans depend on television for information on topics of social concern. For example, when asked where they are most likely to get information on emergency and disaster information, the political process, drug abuse, AIDS, alcohol abuse, and fund-raising for local charities, a majority of the public cites television on five of these six issues, each by a margin of more than 20 points over the next most common response. Only for information on local fund-raising is the public more likely to look to newspapers than television, by a slim margin of 37% to 33%.

Most Likely Sources of Information



Sensitive Topics on TV: Appropriate and Expected

One of the most consistently controversial questions with regard to television concerns the airing of programs dealing with sensitive issues and social problems. In recent years, television programs have dealt with, among other things, racism, domestic violence, and substance abuse.

A considerable majority of the public feels that, it is not only appropriate for the networks to deal with these topics, but they in fact have a *responsibility* to do so.

Specifically, more than three-quarters of the public "strongly" or "mostly agree" that it is appropriate for network television programs to deal with sensitive issues and social problems. Perhaps even more impressive, about two-thirds of the public agree that, not only is it appropriate, but network television in fact has a social *responsibility* to show programming of this sort.

Issues on TV: What is Expected

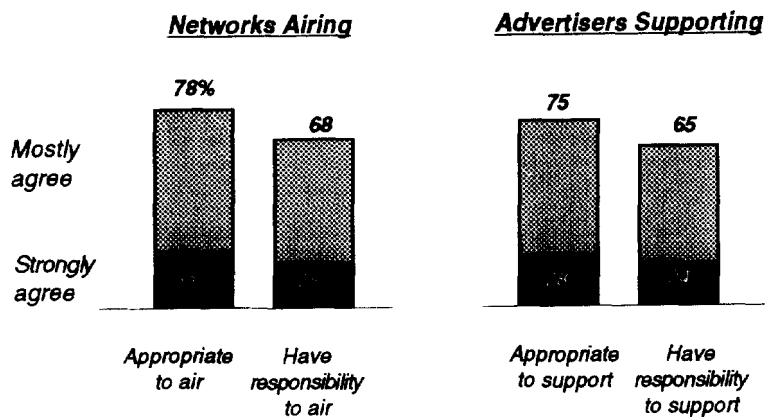
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Moreover, the public's feelings on this issue are nearly as strong when it comes to advertisers: 75% feel it is appropriate for advertisers to support such programming, while 65% feel that advertisers have a social responsibility to provide sponsorship of this type.

Attitudes Regarding Programs That Deal With Sensitive Issues And Social Problems



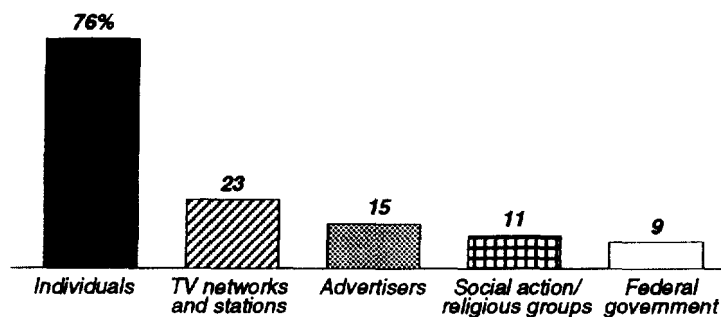
Viewers Want to Decide What They Watch

Viewers want to be in charge of what they do or do not watch, and don't want others making these decisions for them.

As in the past, three-quarters of the public cite "individual viewers" when asked which one or two groups or people should have the most to say about what people see and hear on television. Interestingly, even though only 23% cite the networks, this is still more than twice as many mentions as received by either social/religious groups or the federal government.

Who Should Decide What People See and Hear on Television?

Note: Up to two responses permitted



Decide What They Watch

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Children's Television: Let the Parents Decide

When it comes to children's programming, the adult public is overwhelmingly determined (82%) that it be *they*—the parents—who decide what their children watch. Only relatively small portions of the public want others — such as the television networks, the children themselves, advertisers, social and religious groups, and the federal government — to be among those with the most say in this area.

Who Should Decide What People See and Hear on Television?

two responses permitted



Who Should Decide What Children See and Hear on Television?

Note: Up to two responses permitted

